

India's Evolving Non-Profit Ecosystem:

Trends, Transitions, and the Road Ahead

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Impact Ecosystem vs. Non-profit Ecosystem



Pace of change and transformation* has increased and so have funders and communities' expectations.

“The sport* of doing good in India is changing—not just the rules, but the players, pace, and purpose*.”

The Funders | Givers and | Godfathers

Private Philanthropy

(Family-led, Family-offices, Family-majority stakes)

Trends

In Non-Profit Ecosystem

12 Years | INR 260,000 Cr (CSR fund)

Family-led businesses: INR 157,000 Cr*

Rise of New Wealth Givers | New Narrative Building

271 billionaires in India (2024)

350+ active family offices in India

Leading to a new models of advocacy in private rooms | Narrative Building (Bottom-up to Top-down)

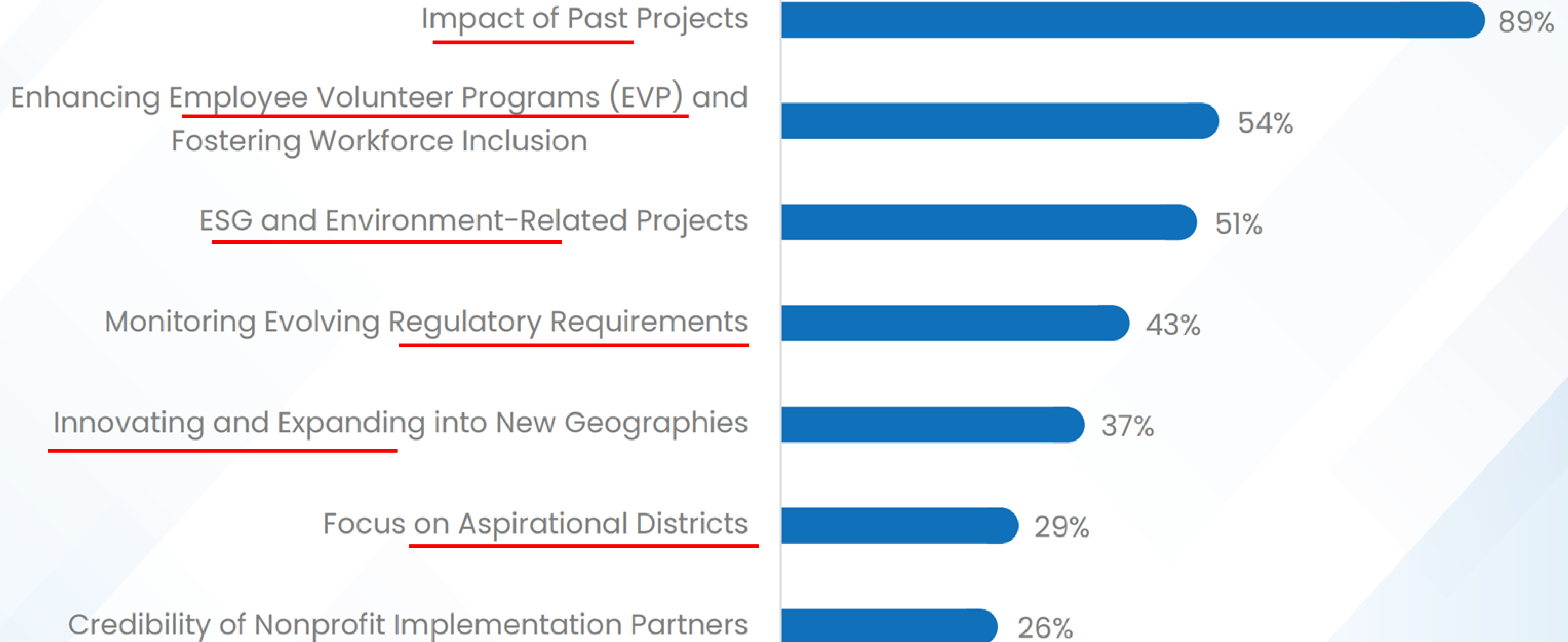
Priority Funding (What to Fund)

- National Priorities
- Narratives from the Board Rooms (peer circle, private rooms and influencers)
- Native-Geolocation priorities (Localization)
- Net-zero Ambition (**Water, Energy, Waste**)
- Nana-nani's legacy

Operating Model (How and Whom to Fund):

- Emphasis on **Outcomes, Scalability, and Sustainability**.
- **Data-driven impact, clear theory of change, and long-term value creation.**
- **Co-ownership** and not just grants.

Buzz-words in the Board-rooms



Transitions

In Non-Profit Ecosystem

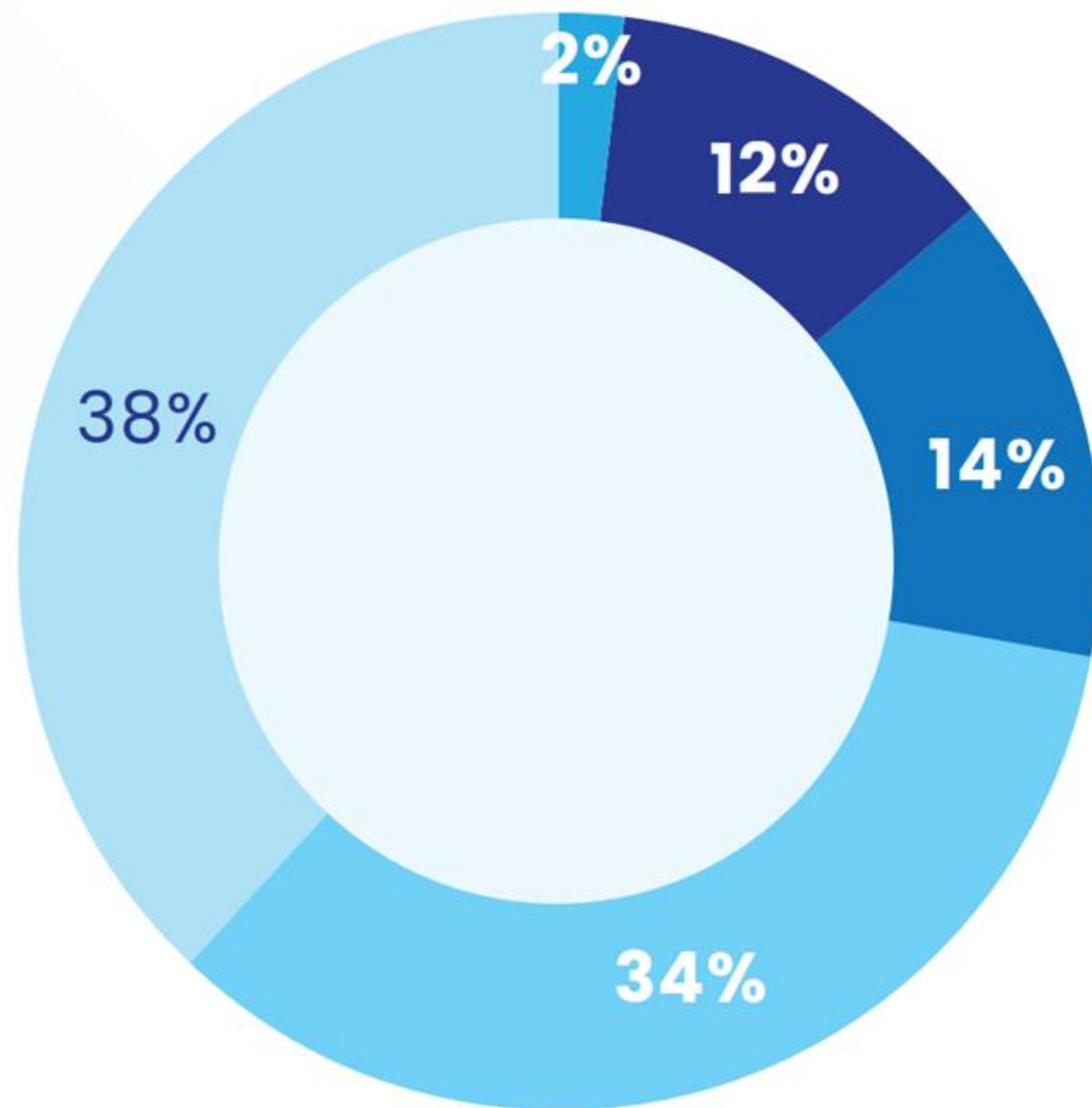
New Operating Models

- Collective Impact Platforms | Multi-sectoral Initiatives (MSI)
- Thematic Accelerators
- Anchor-led Models
- NGOs as System Enablers
- Government-led, NGO-embedded model
- Circle of Influence/Comfort Model

Government and Technology Adoption

- Embed **digital capabilities**
- Emerging fields like **data for good, digital skilling, and tech-for-development** are reshaping program models.
- **AI** in every aspect of life
- Partnerships with **Government Agencies**

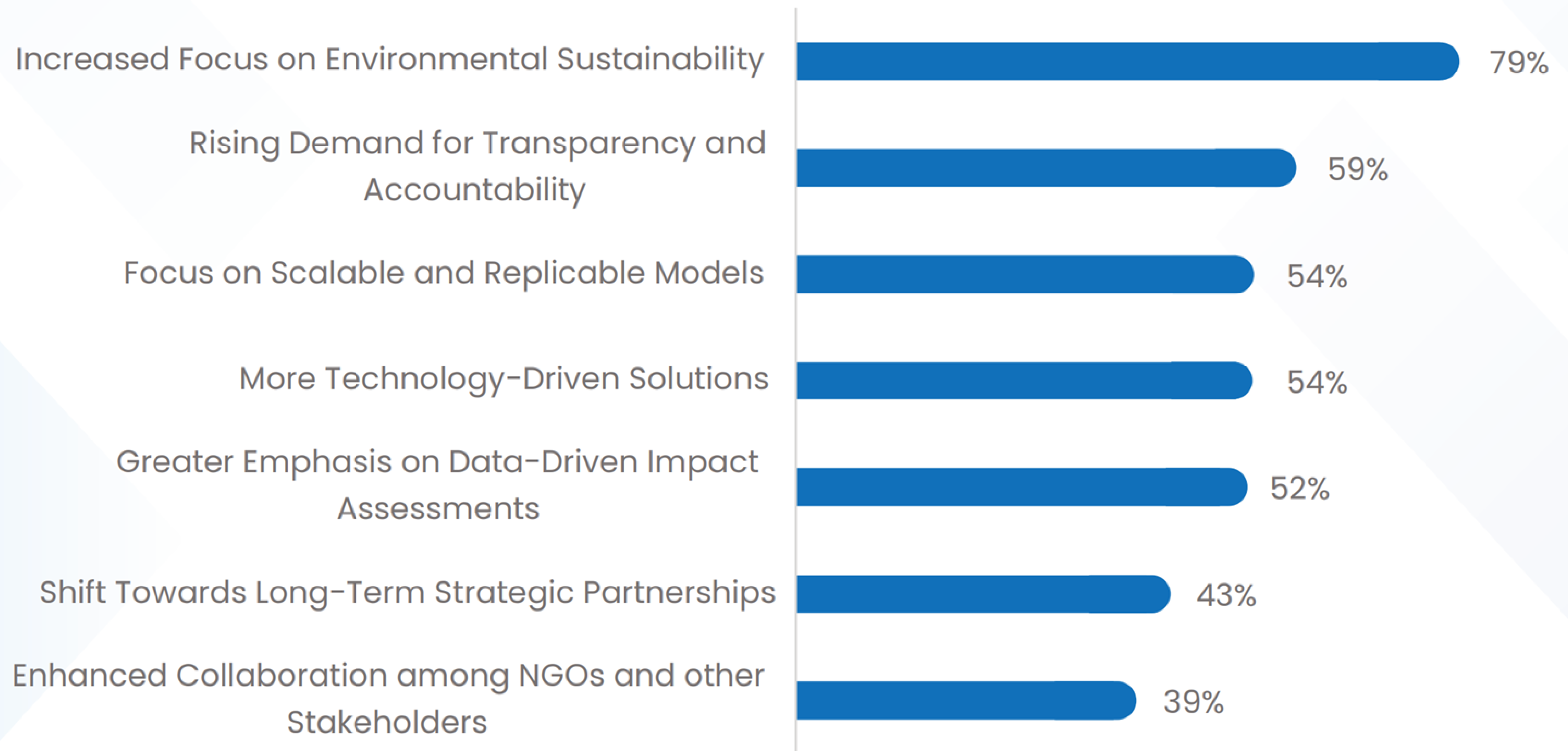
M&E Provisions in Non-profit-led Projects



- Third-party Outsourced Services
- Publicly Available Tools
- Suggested by Donors
- Internal but Customised as per the Donor's Requirements
- No Structured Approach

*Source: CSRBOX Research Desk

Funders' Expectations from NGOs



*Source: CSRBOX Research Desk

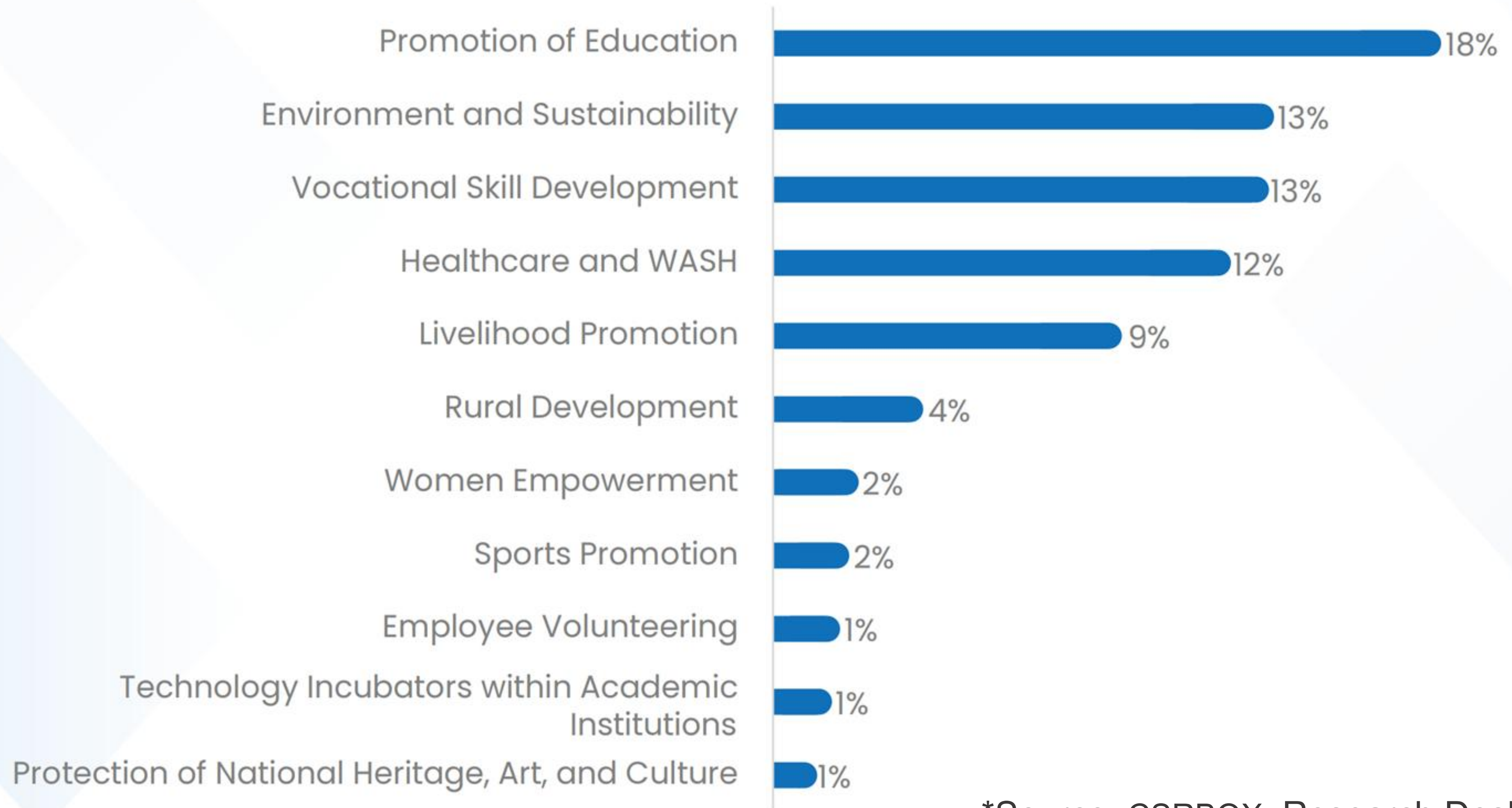
Road Ahead

In Non-Profit Ecosystem

Opportunities to Watch

- **Climate Action and Nature-Based Solutions** (Urban Heat, Agroforestry, Water)
- **Livelihoods 2.0:** Gig economy, creative economy, green economy
- **AI for Social Impact:** Predictive targeting, chatbot-based citizen services, precision skilling
- **Place-Based Development:** District transformation models, rural-urban regeneration
- **Diversity and Inclusion-based** programs

Boardroom Narrative on CSR Priorities



*Source: CSRBOX Research Desk

The Road Ahead

- Invest in **Institutional Capabilities**
- Shift from Project to **Portfolio Thinking**
- Strengthen Government-Corporate Interface
- Build **Narratives and Thought Leadership**
- Sectoral Niche and Expertise
- Brand value creation
- Begin with non-financial partnership*

Thank You